

## PROJECT OVERSIGHT REPORT

Comprehensive Assessment Reporting Evaluation (CARE)  
Department of Social and Health Services

Report as of Date:  
July 2002

**Project Director:** Daniel Knutson-Bradac  
**MOSTD Staff:** Tom Parma

**Executive Sponsor:** Penny Black

**Description:** The purpose of the Comprehensive Assessment Reporting Evaluation (CARE) project is to develop a new system that will enable consistent, accurate, and efficient client assessments and plans for adult Medicaid clients in need of long-term care. The goals of the project are to: ensure correct eligibility determinations are made for corresponding benefits; establish a standard and consistent case management process that will ensure accurate assessments and client care plans; and, provide a formal assessment of risk indicators to reduce liability and protect vulnerable adults. CARE will replace an older Visual Basic and Access-based system developed by the Department of Social and Health Services' (DSHS) Aging and Adult Service Administration (AASA).

AASA has contracted with Deloitte Consulting for the development of the CARE system on a deliverables-based, fixed-price basis for \$2.965 million. Deloitte spent five years designing, developing, testing, and implementing a Comprehensive Assessment system for the State of Oregon. Since AASA's business requirements match those of Oregon, the development of CARE will be based upon a transfer of Oregon's design. AASA has contracted with Starling Consulting Inc., for external Quality Assurance.

The phases are:

- Phase I (DSHS & Deloitte) – Phase 1 project management plan, technical requirements, business requirements, preliminary design, and Phase II Project management plan.
- Phase II (DSJS & Deloitte) – Final design, development, and testing.
- Phase III (DSHS only) – System implementation.

**Technology:** Oregon's system was developed using PowerBuilder, a software technology that DSHS does not have. Therefore, the decision was made to transfer Oregon's design and Deloitte's methodology and knowledge to AASA, but use JAVA and Microsoft SQL Server database technologies to develop the system. Both DSHS and Deloitte have extensive knowledge of these tools.

**Life Cycle Stage:** Phase I Preliminary Design

**Budget:** The 5-year lifecycle cost for the project is \$6.7 million. Of this amount, \$2.965 million is allocated to the Deloitte Consulting contract scheduled through June 2003. AASA staff costs for the first year are project at \$1.162 million. As of June 30, 2002, the budgeted and actual Deloitte expenses were \$408,450.

Phase 1 Budget	Budget	Actual	Variance
1. Contract signed			\$0
2. Phase 1 Project Management Plan	\$97,300	\$97,300	\$0
3. Technical Requirements Document	\$135,625	\$135,625	\$0
4. Business Requirements Document	\$135,625	\$135,625	\$0
5. Phase II Project Plan	\$39,900	\$39,900	\$0
<b>Phase I Totals</b>	<b>\$408,450</b>	<b>\$408,450</b>	<b>\$0</b>

**Schedule:**

<u>Phase 1 Milestone</u>	<u>Schedule</u>	<u>Status</u>
Contract signed	Feb '02	On time
Phase I Project Management Plan	Mar '02	On time
Technical Requirements Document	Apr '02	Complete 2 weeks late
Business Requirements Document	May '02	Complete 6 weeks late
Phase II Project Plan	May '02	Complete 6 weeks late

**Status:** AASA's Phase I schedule was aggressive; they implemented appropriate project management disciplines to deal with the identified areas of risk. Stakeholders have been engaged in all requirements gathering and validation activities. AASA employs multiple methods to keep the stakeholders informed, including extensive use of web-based tools. Management continues to be fully engaged and well informed.

The number of planned business process changes, as well as modifications to the existing Oregon system poses the highest risk to the project. AASA and Deloitte have implemented a system to capture and track all requirements as the stakeholders identify them. These are reviewed and assessed as in or out of scope, and then prioritized.

Project resources, specifically the assigned workload of AASA staff, pose a medium risk to the project. Their time is not fully dedicated to this project. While currently not a problem, it has the potential to become one if not monitored closely. An issue that arose early in the project was the over utilization of the project manager. JAASA management mitigated this risk by hiring a person to assume all implementation planning. This additional resource has helped significantly.

Phase I is complete. Completion date was delayed due to AASA requests for revisions to Deloitte's final design documentation. However, as a result of certain Phase I activities being completed ahead of schedule, management was able to have project personnel begin Phase II in early June.

**Recommendation:** DIS has no recommendations at this time.